

## EXHIBIT 17

Volume 13 Issue #15 11-July-12



## News & Views on Unified Communications & Collaboration



### Just Added to Philly Summit Lineup: Facebook!



**A**s promised last issue, the lineup for our Philadelphia Summit has expanded with an exciting new speaker. *This is a big deal, folks, as the lines between consumer, prosumer, and the enterprise continue to blur with the BYOD movement!* **Christopher Morrish**, a Technologist for Facebook, is deeply involved in helping design and deploy the company's use of collaboration technologies — which unquestionably have helped that rather addictive (to many) service drive growth. Christopher will weigh in on how Facebook has taken widgets and buttons, video and audio, messaging and more, and delivered a collaborative platform to more than 900 million human beings on the planet Earth. That's a user base worth hearing about.



**facebook**

Christopher Morrish,  
Technologist, Facebook

**17-18 July 2012**  
Doubletree Hotel  
Philadelphia Center City

Meanwhile, this is your last chance to [register](#), attend, rub elbows, break bread with WR analysts and your peers, and learn. Can't make it to Philly? Then listen in via our live event stream, provided by none other than **Yorktel**. [Register now for the stream!](#) The Summit will cover every major aspect of unified communications and collaboration technologies, from pharma and healthcare to streaming and UC, from consumer behaviors, mobility and web conferencing to video and B2B. Don't miss us at the Philadelphia Doubletree Center City on July 17-18.



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**Driving Business Transformation with Conferencing and Collaboration Solutions**

## FOUR Technology Specialists!



*Mobility's Impact on B2B Videoconferencing*

**Mike Brewington,**  
Executive VP of Global Sales,  
AGT



*Video Collaboration: Out of the AV World, Into the Real World, and onto the Cloud*

**David Danto,**  
Principal Consultant, AV,  
Multimedia, UC & Video,  
Dimension Data



*Driving Business Transformation with Process Integrated Collaboration Technology*

**Peter Stewart,**  
SVP, Collaboration Technology Services, PGi



*From iPads to Immersive: Service Strategy for today's collaboration environment*

**David Phillips,**  
President,  
Yorktel

## FIVE Senior WR Analysts!



*UC Integration in the Enterprise: The top 5 Opportunities for Success*

**Bill Haskins,**  
Senior Analyst,  
Wainhouse Research



*Do mobile devices in the Enterprise spell disaster or opportunity for collaboration?*

**Alan Greenberg,**  
Senior Analyst & Partner,  
Wainhouse Research



*From Meeting at-a-Distance to Working from Anywhere*

**Andy Nilssen,**  
Senior Analyst & Partner,  
Wainhouse Research



*Enterprise IP Communications: The State of the State*

**Andrew Davis,**  
Senior Partner,  
Wainhouse Research



*Squeezing Value from Enterprise Streaming*

**Steve Vonder Haar,**  
Senior Analyst,  
Wainhouse Research

Attend, rub elbows, schmooze, and learn. Be sure to keep up with the latest developments at [www.wainhouse.com/philly12](http://www.wainhouse.com/philly12).

For more information, contact the Event Director, [Richard Norris](#), or please contact our [sales](#) team.

## EIGHT UC&C Strategists from Major Enterprises!



*Lifting the lid on collaboration in Facebook. How collaborative solutions have helped underpin the phenomenal growth of Facebook*

**Christopher Morrish,**  
Technologist, Facebook, Inc.



*Integrating across the Visual Communications spectrum: changing evidence based medical benefits*

**William Moore, EVP & CTO,**  
CareCore National



*Telemedicine is Transforming the Delivery of Healthcare & Education*

**Dr Ed Brown,**  
CEO,  
Ontario Telemedicine Network



*Lessons Learned for Effective Deployment of Immersion Video in the Enterprise*

**Merrill McMullen**, Director, Connectivity Solutions Architecture, Pfizer



*Banking on Video Collaboration—How a Global Financial Enterprise guarantees their return*

**Michael Obledzinski**, VP Network Technology, The Depository Trust Company



*Head to Head: Key Criteria for Collaboration-Enabling Your Network*

**Mike LaHaye**, Director of Technical Services, Internet2



*Mayo Clinic's Video Challenge: 200 Million Patients by 2020!*

**Warren Harmon**, Head of Section, Media Support Services, Mayo Clinic

**Bill Wimsett**, Project Manager, Media Support Services, Mayo Clinic

## Another Take on InfoComm

Ira M. Weinstein, [iweinstein@wainhouse.com](mailto:iweinstein@wainhouse.com)

WR analyst Ira Weinstein offers his take on InfoComm, supplementing Alan and Andrew's comments last month. Read on to [Letters to the Editor](#) for feedback from [AGT](#) and [Vidtel](#) regarding our last InfoComm story.

**What Ira Thinks** (in alphabetical order): [AVI-SPL](#) gave us an update on its Unify ME managed service offering. The service is now based on the Symphony management platform that AVI-SPL obtained via its acquisition of Iformata in early 2012. In addition, the company announced a new point of presence (PoP) in the Equinix data center facility in Chicago. AVI-SPL's R&D team is also busy expanding the Symphony platform to include pro-AV monitoring and other features often requested by customers.



[Cisco](#) updated us on its videoconferencing and streaming solutions. Noteworthy items included the fact that Jabber is now available for PC, MAC, Android, iPhone / iPad, and Blackberry — although supported features vary. In addition, in only eight weeks, downloads of the Jabber Video for TP client (now in what Cisco calls a "reasonably open beta") reached five digits. This currently free service allows users to download and install a free client, which then registers to Cisco's cloud service and supports point-to-point calling. Those interested in multipoint calling or other advanced features can upgrade to Cisco's Callway service (now rebranded [Cisco WebEx Telepresence](#)

since InfoComm took place) or go with a CPE model. Cisco also mentioned that its new simulcast architecture for multipoint videoconferencing will be available within ~ 12 months. Note that we recently published a research note for client subscribers called "[Video Architectures: Disruption Ahead](#)" which provides insight into simulcast and other next-generation videoconferencing architectures.

[CompuNetix](#) demonstrated its [Evergreen](#) video bridging platform, featuring a new generation of boards that expand the capacity of each chassis to more than 300 connections at 720p/30 video resolution. The solution also supports linking multiple chassis via fiber connections to create a single MCU that is actually deployed across five different chassis. The fiber connections are actually high-speed (50Gbps) busses that allow CompuNetix to move raw video between MCUs. The result is a single MCU supporting more than 1,000 connections.



This was the first year that integration powerhouse [Dimension Data](#) exhibited at InfoComm. We view this as another example of



the merging of the AV, VC, and IT worlds. During our meeting with the company, Dimension Data reminded us that its video managed service offering is now available globally, and that the company's multi-lingual video network operations center (VNOC) is staffed by ~ 65 people with expertise

in videoconferencing, audio-visual solutions, network technologies, and telephony.

**locom** gave an impressive demo of the company's software-based, client-server conferencing solution called Visimeet. The Visimeet line includes room systems, PC systems (Windows and MAC), and an Android client. (iPad version coming soon.) For those of you who have not seen this system in action, it's worth spending a few minutes on the company's website or downloading the free trial. Key differentiators include support for sending multiple camera signals from a single room (think multi-codec but using a single PC-based codec), multipoint without transcoding (think low cost, high scalability), interoperability with H.323 and SIP via the central server, and native resolution data sharing. Visimeet is available in a CPE product or hosted form.

**MyVRM** demo'd the latest version of its scheduling software. Key capabilities include the ability to schedule from iPad, iPhone, and Android devices, support for scheduling meetings, AV equipment, support staff, and catering, and integration with both Microsoft Outlook and IBM Lotus Notes.

This year **Sony** showed several products. The PCS-VCS software-based video bridge supports H.323, video resolutions including 1080p, 1080i, and 720p60, and up to 250 endpoints (transcoded). The PCS-RS software-based recording server

**SONY** records 5 simultaneous H.323 signals at up to 720p/30 resolution

and can store up to 1,000 hours of recorded content. The company also demo'd the PCS-EP software video endpoint which is tied to the company's VCS video bridge. According to Sony, these products are all in general availability but US pricing is still TBD.

WR spent a few minutes with audio-visual distributor **Stampede**. This distributor announced that it is reducing the list price of three Sony videoconferencing systems by as much as 44%. In addition, Stampede mentioned its lease program, which makes Sony videoconferencing available for less than \$100 / month. For those of you struggling to keep up, in March Stampede was named a US distributor for Radvision (now a part of Avaya). Clearly Stampede is stepping things up a notch within its VC division.

**StarLeaf** announced a series of new products at InfoComm. StarLeaf Breeze is a software client that



supports HD video, multiparty conferencing, and screen sharing on PCs and tablets. When used with a StarLeaf Phone, Breeze users on an iPad can use the iPad as a video display and conduct standards-based video calls with wideband audio. The StarLeaf PT Mini is a palm-sized personal video appliance that connects to a user's PC, monitor, and webcam and a StarLeaf Phone. For a list price of \$995, a user can add HD-quality videoconferencing to his existing workspace (assuming they have a StarLeaf server in-house or are using the StarLeaf cloud service). In addition, StarLeaf reduced the list price of the StarLeaf Personal TP system from \$4,995 to \$2,495.

As Andrew mentioned last month, multi-codec innovator **Teliris** has made a bit of noise lately with an expanded line of endpoints including multi-codec (Teliris Virtualive and Express), single-codec (Teliris StartPoint), and personal systems (Teliris @nywhere). The company has also expanded its white-glove managed service offering (required for all Teliris endpoints) to support non-Teliris video systems. As they put it, "We are no longer just a multi-codec company. We can do it all now — with our endpoints or yours, on our infrastructure or yours."

Finally, we were pleased to receive another demo of the **VQ Conference Manager**, a multi-tenant, multi-vendor capable scheduling, management, and reporting solution intended for use by service providers. Recent enhancements include reporting of call failures, additional insight into cost metrics, increased UI responsiveness, and support for environments with up to 50 MCUs. Note that Conference Manager is actually a software application developed using the API to the VQ management platform. This API allows service providers to develop customized solutions and offerings that leverage VQ's management engine.

## News in Brief

- Enterprise social network provider **Yammer** has signed a definitive agreement to be acquired by none other than **Microsoft**, to the tune of \$1.2 billion. The Redmond titan indicates that after the close of the deal, it will continue to invest in Yammer's freemium, stand-alone service, and place the Yammer team within the Microsoft Office Division. Launched in



2008, Yammer already has more than 5 million corporate users, and claims that 85% of the

Fortune 500 are users. The service allows employees to join a secure, private social network for free and then makes it easy for companies to convert a grassroots movement into a companywide strategic initiative. Microsoft also promises over time that its customers will see more connections between Yammer and **SharePoint**, **Office365**, **Dynamics** and **Skype**.

- AXA Private Equity** has bought a 45% stake in France-based **Arkadin**. The deal closely follows the exit of Arkadin's original investors **Apax Partners**, **Altamir Amboise**, **Innovation Capital** and **UFG-Siparex**, and is meant to help the company expand more aggressively into Asia and Latin America. The deal is subject to anti-trust agreement and is scheduled to close by the end of July 2012. Meanwhile, Arkadin announced a partnership with **NTT Bizlink**, a subsidiary of NTT Communications Corporation, to provide videoconferencing to Japanese businesses. NTT Bizlink combines Arkadin's cloud-based videoconferencing with its products to offer solutions available at NTT Communications Group.

- Avaya** announced an enhanced portfolio for "customer experience interaction management" (you should see how they word it; we like our wording better). The enhancements include Avaya Customer Connections Mobile, which enables customers to navigate dynamic smartphone menus and accomplish a richer set of interactive choices, and Social Media within contact centers via its Avaya Social Media Manager. The portfolio includes support for web video with its **Avaya One Touch Video**, which enables a simple hyperlink embedded on a web page or sent via email to make possible voice and video collaboration between agents, experts or other enterprise employees and end users. These can

be outside of an enterprise but get access if they have any Internet-connected device with a browser.

- Blue Jeans Network** has drawn another \$25 million in funding (Series C) from **NEA**, **Accel** and **Norwest Venture Partners** (the latter having funded **LifeSize** to the tune of \$19.1 million back in 2003).

Such funding may help in BJV's marketing, witness its edgy billboard running in the San Francisco Bay Area.



Blue Jeans also shared with us a screen shot of its new browser access option, which was introduced when it celebrated its one-year anniversary. The new browser option, currently available in beta, allows participants to connect to a Blue Jeans meeting with nothing more than their Chrome, Firefox, Internet Explorer, or



Safari browser (respectively) and a camera — significant in that many enterprise workers cannot download apps but virtually all can run their browsers. In its first year of

operation, the Blue Jeans service has connected over a quarter of a million participants into hundreds of thousands of video meetings.

- Qumu** has announced a mobility-and functionality-related update to its Video Control Center (VCC) platform solution for the enterprise. Updates include support for mobile devices including Windows Phones, iPhones, iPads, and Android phones and tablets. Some of the VCC 6.2 features include social enhancements for mobile devices, including interactive events, rating and commenting; HTML5 and native app support on mobile devices; Pathfinder technology (dynamic content routing based on device and bandwidth); player watermarking; improved content preparation; and simultaneous

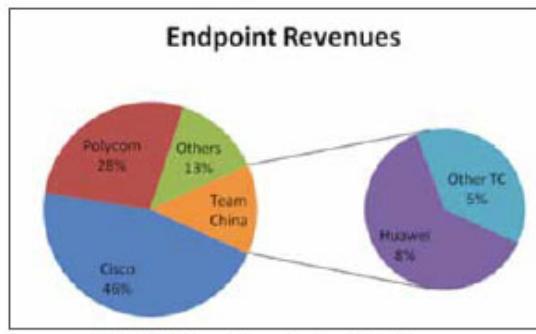
- adaptive and standard streaming to eliminate the need for separate encoders.
- **Netbriefings** has announced the ability to post Proclaim Messenger videos to Facebook with inline slides and video content from the iPad app and desktop version, as well as a new ability to post Proclaim video messages to Twitter as tweets on a user's timeline.
  - **T-Systems** has signed a deal with **Tata Communications** to expand its Telepresence offering. The interoperability agreement with Tata Communications enables T-Systems and Tata customers to hold meetings via their respective networks.
  - **Cisco, AVI-SPL, and TELUS** all have announced they are joining the **Open Visual Communications Consortium**, which now totals 27 member organizations.
  - Getting vertical on us, web conferencing vendor **RHUB Communications** has partnered with **Otovation** to power its RemotEAR technology, a technology meant to support hearing care professionals with conferencing and remote diagnostic services. The Otovation technology enables an audiologist / hearing care professional to perform an exam and provide face-to-face counseling with patients using RemotEAR, a branded version of RHUB Communications' web, video conferencing and remote desktop technology.
  - **TalkPoint** has announced a partnership with A/V equipment maker **Roland Systems Group**. This will enable TalkPoint to offer seamless live web streaming to Roland clients by allowing Roland's VR-3 and VR-5 vision mixers to be connected via a PC USB port and utilize TalkPoint's Convey SaaS-based self-service webcasting tool. Convey recognizes the VR-3 and VR-5 as a webcam so that AV professionals can record high-quality audio and video events.
  - WR's **Bill Haskins** saw **Mitel's** big product announcement at its partner conference in San Diego: the Mitel UC360 Collaboration Point. The device combines multi-party HD video and audio with in-room presentation display, including document sharing for remote participants. As Bill put it, "it's essentially an IP-enabled, Android-based video / speakerphone with four-port A/V bridge." It also allows you to associate an IP video camera with the device (e.g., security cam); coupled with HDMI

out and an external TV/Monitor, you have a low cost lightweight video appliance/bridge. The UC360, designed for Mitel's SMB market, has an MSRP of approximately \$1,995.

## 2012 Videoconferencing SpotCheck Report

Andrew W Davis, [andrewwd@wainhouse.com](mailto:andrewwd@wainhouse.com)

Q1 is always a downturn for the videoconferencing industry, while Q4 is always a high point. This year's results were even more "down" than usual, however. Full details are in our Q1 SpotCheck report, available to Group Videoconferencing subscribers.



## New Free White Paper: Multipoint Videoconferencing Goes Virtual

This [white paper](#), sponsored by visual collaboration solution provider Vidyo, provides insight into the fundamentals of video bridging, and highlights a next-generation multipoint architecture based on intelligent media switching. This approach eliminates the need for processor-intensive (and expensive) transcoding, increases flexibility in deployment, supports both virtual and non-virtual environments, supports a gradual expansion path, and is less expensive than competing solutions.





## Letters to the Editor: AGT, Vidtel

Every now and then we miss a fact; in this industry it's hard to keep up with who's on first and what's at third. So we failed to bat 1,000 in last month's InfoComm report. Special raps on Andrew's and Alan's knuckles for letting slip a misstatement regarding AGT, after writing about the fact that AGT remains firmly embedded in the managed services game just a few months ago ([Volume #13, Issue 11](#)). AGT also introduced its roadmap (kudos to companies that have the maturity to do that) and described its upcoming enterprise email dialing capabilities for mobile users and upcoming consumer video gateway for supporting access to SKYPE and Google Video Chat.

- *Thanks for the quick coverage within your bulletin based on our booth sit-down at InfoComm. The subject about mobility, which is our leveraging of Mobile Pathway Protocol within EncoreB2B for smartphones, tablets and soft-clients and sold through partners (SPs, OEMs, etc), was accurate. However, you said we exited both the A/V Integration business (right) and*



*Managed Services (wrong). AGT Managed Services is a majority of our business, and our IP technology is wrapped with a MS practice and delivered as a monthly charge to our clients. FathomHD is at the core of all the MS accounts we've won over the past 2 years (i.e. SunGuard, SteelCase, NASCAR). Finally, we believe our channel partners will want to rebrand and resell our technologies for their own managed service accounts, for the same reasons we find this as the most successful (win-win) method for delivering UC. Thanks, just wanted to clear this up so that none of my Managed Services clients starts questioning our team.*

— Mike Valletutti, CEO, Applied Global Technologies

- *I appreciate that you highlighted our new Gateway service that interworks with existing MCUs/bridges. I would like to clarify that we offer three types of services (unlike BJT, which only offers a MeetMe service). We offer Vidtel Connect (point-to-point, device registration and firewall/NAT traversal), MeetMe, and the Gateway. I just wanted to make that distinction because your description implies that BJT offers MeetMe and we don't.*



— Mariette Johnson Wharton, VP of Marketing, Vidtel, Inc.

### Introducing one of the WR Bulletin Sponsors



Established in 1996 and based in Ontario Canada, Video Furniture International Inc. (VFI) is leading manufacturer of affordable, stylish and durable videoconferencing furniture. VFI has grown to be an industry leader by providing excellent products and service at a competitive price. By listening to our customers' needs and desires, we have expanded our offerings to include complete line of videoconference and A/V furniture in painted and laminate finishes, including multimedia stands, tables, podiums, kiosks, etc. These offerings support a wide range of multimedia applications including educational, military, business and corporate training and are available from distributors and resellers of videoconferencing equipment worldwide.

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We remain an equal opportunity critic.



## 1:1 with Polycom — Jim Kruger, Senior Vice President, Global Solutions Marketing, on Rebranding

Alan D. Greenberg, [agreenberg@wainhouse.com](mailto:agreenberg@wainhouse.com)

**S**ome of my WR colleagues were skeptical about an interview on Polycom's rebranding. "Why ask about branding when there are so many other things for Polycom to worry about?" My thought: stock market valuation and a fiercely competitive market environment are only a couple of many ways to measure corporate performance. There's a bigger picture here about overall corporate transformation worth discussing. So we spoke with Jim Kruger over video, and here you have it.

**WR:** Tell us your role please before we dive into the focus on rebranding.

**JK:** I am Senior VP over product and solutions marketing at Polycom and have been with the company for 11 years. My team creates all of the content, messaging, positioning, and Web content for all of Polycom's products, services and solutions. I also manage our competitive intelligence and analyst relations teams.

**WR:** Polycom's new brand became effective in May 2012. Why did you decide to change one of the most recognizable brands in the industry?

opportunity to make a change as we transition into a company that leads with software. Many people know us as the "triangular conference phone company," so we chose to move away from a triangular shape logo and move to a more modern look and feel and use typeface that is much more open and friendly.

One of the key areas in which we are focusing includes leading more with software. We don't say we're a software company only. We lead with software and recognize that the value of what we provide in terms of functionality and differentiation is software-driven. We want to specifically call out the concept of software as we move forward and launch new products like RealPresence Mobile — software that can be used on multiple tablet and smartphone platforms. While we are emphasizing our software strategy, we're not getting out of the hardware and services businesses. Our ultimate focus is to provide the industry's best experience. So the new logo is focused on calling that out. Our customers want the option to use our software and capabilities on standard hardware. They want the option to purchase solutions using opex budgets vs. capex. So it was time to stand up and tell the world who we are and send a signal to the market that we are transitioning as a company.

**WR:** I'm surprised you aren't mentioning Apple as an example of how a brand gets

positioned for both hardware and software tightly integrated.

**JK:** Good question. Yes, look at Apple, or Google buying Motorola Mobility, creating a combination of hardware and software together. The key is in focusing on the customer experience, how to drive that customer experience. We'll continue to focus on the customer experience, while also leveraging devices like the iPad and smartphones.

1992-2012



2012 and beyond.



**JK:** Our logo and brand identity had been around for over 20 years and based on our vision, strategy and company direction we decided the timing was right for a change. Yes, it is one of the most recognizable logos in the industry, but when you evaluate the logo and typeface closer, it no longer represented the company we have become and the company we aspire to be. So our goal was to make it better. There is a lot of equity in the name of the company, so there was no need to change that, but the logo and typeface offered a great

**WR:** We learned over the years that rebranding is truly very expensive for a company. It is not the most visible changes on the corporate web page but instead the cost of updating products, user interfaces, and documentation to reflect the new brand. Have you estimated the cost of rebranding?

**JK:** We did an extensive analysis around the cost and how do we do this in an approach that would be methodical and prudent. We needed to give enough lead time for Polycom and our channel partners to transition. You can't drive an edict that "everything must transition by next week." In addition, we were very mindful about keeping our demand generation and other core marketing activities moving forward while going through the re-branding. So we're looking at this as a transition over multiple months and into the next year and we're fine with seeing both logos co-exist in the market for a period of time. We did give our partners advanced notice by explaining our change in brand strategy at our TEAM Polycom event in early April. We did not actually publicly announce anything until late May when we opened our new headquarters in San Jose and launched a complete overhaul of our company Web site. If you look across our product line, and look across our buildings and assets, we're taking a more prudent approach, spreading out the brand transition over a period of time. We're tying the refresh of the brand into the normal course of business so our channels don't have to incur significant costs.

**WR:** Rebranding always creates inconsistencies in the portfolio and a ripple effect through the channel, which uses the Polycom brand in its marketing materials. What work was done to prepare the channel for this rebranding effort? How is the Polycom channel reacting?

**JK:** The feedback from our partners has been very positive. There are always different camps and some skepticism as to "why now?" The feedback we received at TEAM Polycom was positive, with comments such as "it's about time, we needed a change," and people recognized that it corresponds with the new direction of the company. There was some concern around cost, but once we shared our plan and methodology they breathed a sigh of relief because we did not put short stringent timelines in place. We recognize this impacts their physical properties, trade booth signage and collateral, and so on. We are making it an easy, smooth transition that will benefit all of us over time.

**WR:** The most obvious change is the Polycom logo: the well-known tricon is replaced by "three fluid transparent elliptical arcs symbolizing connection, mobility, information sharing and collaboration." What was missing or not working with the tricon and its "sharp edges?"

**JK:** When going through a re-brand, many people focus only on the logo change. We made a strong effort to not focus only on the logo. Part of what our creative agency (John McNeil Studio) did in preparation was conduct over 100 internal interviews with a broad spectrum of Polycom employees, asking "what does the brand mean to you and where do you see it going?" This truly was an initiative from the ground up. We look at branding as going into the core DNA of the company. We asked ourselves, "How do Polycom employees feel about the brand, and how are its attributes being projected externally? Do our employees buy into it?" The key to any brand effort is that it must permeate throughout the organization. If you're a customer service rep it influences how you answer the phone, how you take care of customers. So the approach we took was to explore our core brand promise. In conjunction with the re-branding, we developed a new brand promise, vision and strategy and made sure that these were tightly integrated into what the brand represents. So there was a lot of work done internally before we rolled out the new brand. And that included some key exercises in which all employees participated. We called it our "Good to Great" campaign. [Editor note: reference to Jim Collins' bestseller on great companies and how to transform an enterprise from good to great.] We put effort into supporting every function of the company, individuals as well as functional groups, to move from good to great to meet our brand promise before we moved to the external announcements and the unveiling of our new logo. We are in the early stages of the transition and are in it for the long run.

#### WR & UC+C Analyst Appearances & Events

17-18 July 2012 Philadelphia	<a href="#">WR Collaboration Summit</a> , Doubletree by Hilton Hotel
13 September, Chicago	Andrew W. Davis, AV-SPL, <a href="#">Collaboration Expo 2012</a>
9 October, 2012, Boston	WR CSP Summit, Hotel Commonwealth
28-29 November 2012, Singapore	<a href="#">WR UC&amp;C Summit</a> , Conrad Centennial

**WR:** Polycom was known in the past for unveiling a new PowerPoint template once a year, every time a new CMO came along. Often little else changed from a marketing perspective. Why is this different?

**JK:** We are transforming the company from the bottom up. Our entire employee base is part of this change. The timing was right for us to tell the world that Polycom is much more than what people perceived us to be. It is important for us to transition from the "conference phone company" to a software orientation and show that we're at the leading edge of innovation and delivering exceptional customer experiences. Our new brand and positioning truly aligns with our vision, strategy, and our openness to standards and industry leading partnerships. There are many incorrect perceptions around branding — it isn't just a new logo or a \$50 million advertising campaign (although I will take that \$\$ for a campaign any day if someone wants to give it to me). It goes deep into your values and belief systems

and is tied to every aspect of your company. Kate Hutchison, our CMO, is an expert in branding, having done similar work at BEA and Citrix. She brought us significant experience in this area, which helped us to do it right. Our agency — John McNeil Studio — also did a phenomenal job.

**WR:** So I can't help myself — what are the funniest "first takes" you've heard?

**JK:** At one of our customer council meetings I led few weeks back I asked about their thoughts about the logo. Several mentioned that because of the timing, they were wondering will people get it confused with the Olympics or think that we're tied into the Olympics in some way. If you look at the transition from the old brand to the new brand: we have kept the sum of three. The old brand was about voice, video, and data. We have kept that theme now with 1) connectivity, 2) mobility, and 3) information sharing and collaboration.

## New Studies from Wainhouse Research

For information on WR studies and subscriptions, contact [sales@wainhouse.com](mailto:sales@wainhouse.com)

### ► Streaming

#### **Vendor Profile – TalkPoint**

TalkPoint, a long-time provider of Webcast event services, is expanding efforts to sell hosted solutions that companies can use to provision their own online events. The product line expansion positions TalkPoint as a more viable technology partner for other organizations looking to establish their own presence in the webcast services field.

#### **Vendor Profile – Kaltura**

Kaltura positions its platform as the centerpiece of an "open-source community" for online video. While the company likely will fall short in its efforts to mimic the success of open-source stalwarts addressing other technology sectors, such as Red Hat, Kaltura's approach to the market still positions it as a nimble competitor in the fast-evolving enterprise streaming sector.

### ► Group Videoconferencing

#### **Videoconferencing Services Terminology 101: Video Bridging vs. Video Calling vs. Video Managed Service**

Videoconferencing service offerings are all the rage. Yet, as WR talks with vendors, resellers, service providers, and end-users, we've noted a lack of understanding between what constitutes a video calling service, a video bridging service, and a video managed service. This research note clarifies the differences and categorizes some of the key videoconferencing services players.

#### **SpotCheck – Videoconferencing Endpoints & Infrastructure Q1-2012**

Worldwide and regional unit sales, revenues, and market shares for videoconferencing endpoints and infrastructure technologies, with breakdowns by type of product (multi-codec, single-codec, executive or video MCU and other video infrastructure)

#### **Research Note – Video Architectures: Disruption Ahead**

Scalable video coding and simulcasting are two video technologies threatening to disrupt the incumbents while at the same time taking videoconferencing truly to the cloud.

#### **Comparison Matrix – Videoconferencing Managed Service Providers**

Comparisons of almost 60 regional and global providers of videoconferencing managed services, including ACT Conferencing, AGT, Arkadin, Asnet Technologies, AT&T, Audability, Avaya, AVI-SPL, AVM, BCS Global, BrightCom, Broadreach, BT, and many others.

### ► Unified Communications

#### **Market Forecast – 2012 European UCaaS Market Forecast**

Provides a description of the current state of the European market, assesses current trends, identifies risks and opportunities, and provides assistance on market approach, services and prices. Current market data and analysis and forecast information are included in this study.

#### **Provider Reviews – 2012 European UCaaS Vendor Reviews**

Review & analysis of 13 UCaaS Vendors operating in Western Europe – A critical review and assessment of top UC providers operating in Europe. Includes a summary of UC features, company background, UC product description, and analysis of each provider's approach.

#### **► Personal and Web-Based Conferencing**

##### **Market Forecast – 2012 Worldwide Web Conferencing Service Market Size & 5-Year Forecast**

Focuses on the services that are marketed to conduct personal on-line conferencing and collaboration worldwide. Provides market sizing and five-year forecasts for hosted web conferencing. Additionally, provides market ranking by provider.

##### **Vendor Profile – Adobe**

Detailed information, insight, and analysis on Adobe and its personal & web-based related offerings (includes Connect 9).

##### **Market Forecast – 2012 Asia Pacific Web Conferencing Service Market Size & 5-Year Forecast**

Focuses on the services that are marketed to conduct personal on-line conferencing and collaboration in seven Asia Pacific markets. Provides market sizing and five-year forecasts for hosted web conferencing. Additionally, provides market ranking by provider.

##### **Market Forecast – 2012 North American Web Conferencing Service Market Size & 5-Year Forecast**

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#### **► Distance Education & e-Learning**

##### **Comparison Matrix – Lecture Capture Solution Capabilities Comparison Matrix**

This 30-page comparison matrix includes information from leading vendors of customer premise and hosted offerings of lecture capture solutions. Included providers are Cisco Systems, Discover Video, Echo360, Panopto, Polycom, Qumu, Sonic Foundry, TechSmith, Tegrity, VBrick, Vidizmo, and 323link.

##### **Vendor Profile – Kaltura for Education & Training**

Kaltura has focused on leveraging open source software. Its Cross Campus Media Suite and effort to enable the "Campus YouTube" have made it an appealing provider to promoting video for education and training.

##### **Vendor Profile – iLinc**

Founded in 1993, iLinc was one of the early web conferencing players in educational and training markets. iLinc has evolved, grown, shrunk, struggled, been acquired by UC / telecommunications software provider BroadSoft. What is the company doing right and what should users and potential partners keep in mind if they are considering iLinc's four offerings?

##### **Vendor Profile – Tegrity**

Since its acquisition by McGraw-Hill in fall 2010, cloud-based lecture capture provider Tegrity has been quiet on the development front but active in transforming its sales strategy. Now that it has gained some stability from being part of a larger unit, what product and sales channel issues does Tegrity need to address to remain competitive?

#### **► Audio Conferencing**

##### **Market Forecast – 2012 Worldwide Audio Conferencing Service Market Size & 5-Year Forecast**

Focuses on services and market trends related to PSTN and IP-based audio conferencing solutions worldwide. Provides market sizing and five-year forecasts for hosted audio conferencing services market. Forecasts include minutes, average selling price, and revenues.

##### **SpotCheck – 2012 Q1 CSP SpotCheck**

Details quarterly trends of volume and revenue in top markets for audio and web conferencing services

##### **Market Forecast – 2012 Asia Pacific Audio Conferencing Service Market Size & 5-Year Forecast**

Focuses on services and market trends related to PSTN and IP-based audio conferencing solutions in seven Asia Pacific markets. Provides market sizing and five-year forecasts for hosted audio conferencing services market. Forecasts include minutes, average selling price, and revenues.

##### **Market Opportunities – 2012 North American Audio and Web Conferencing Services Market Opportunity**

The objective of this study is to size the addressable market in the US and Canada for audio bridging minutes and revenue as well as for revenue for web conferencing services. The addressable market potential is compared to the forecast market probability for 2012.

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